

## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 1




**Indiana**  
Department of Local Government Finance  
Committed to a fair and equitable property tax system for Hoosier taxpayers.

### How to Use the Gateway Budgets Application in 2014

**Ryan Burke**  
*Program Coordinator*

1

Slide 2




### Gateway Budget Form Updates

- 2015 Budget Forms are Live!
- Users can login to prepare units for budget season: [gateway.ifionline.org](http://gateway.ifionline.org)
- Still under development, some new features coming soon!

2

## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 3



### Gateway Budget Form Updates

Pay 2014

- County Council Review Worksheet in Gateway
- Error Prevention Report added to help officials catch common mistakes
- 1782 Notice Recipients Form

Pay 2015

- Partial online Notice to Taxpayers
- Error Prevention Report printing in development
- Possible Form 3 uploads from Workshops
- Many smaller updates as well!

3

Slide 4



### Public Data Site & Logging In



for government units

An Information for Indiana Data Site

Home | Report Builder | Download Data | Learn More | Local Officials: Login Here >

#### An Open Door into Local Government Finance

Gateway collects and provides access to information about how taxes and other public dollars are budgeted and spent by Indiana's local units of government.

**View units' reports** →



Counties



Schools



Cities/Towns

**Click to access login page** →

Find my units

Enter your address

What's new

- Property tax summaries for Indiana and counties are now available.
- View all reports available for a specific government unit.

Popular reports

- Disbursements by Fund Report
- Budget Estimate, Financial statement and tax rate
- Jointexp Assistance Statistical Report

<http://gateway.ifionline.org>

4

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 5

**Getting Started: Log-In**

**Gateway**  
for government units  
An Information for Indiana Data Site

The Indiana Gateway for Government Units provides a central commons for local units to submit their financial forms to the State of Indiana.

**Authorized Personnel Login**

User Name:

Password:

\*After 5 failed attempts, account will be locked

[Forgot your password?](#)

If you need assistance logging in please select "Forgot your password" or email [gateway@dlgf.in.gov](mailto:gateway@dlgf.in.gov).

5

Slide 6

**Select Application**

**Gateway**  
for government units  
An Information for Indiana Data Site

Welcome to the Indiana Gateway for Government Units

As an authorized user, you will have at least one application to use. Each of these applications enables a local unit to submit its required forms, reports or files to the appropriate state agency, which currently include **DLGF** (Department of Local Government Finance), **SBOA** (State Board of Accounts) and **IEERB** (Indiana Education Employment Relations Board).

**Select Application**

Budgets	Debt Management	Annual Financial Report
SB 131 Reporting for SWMDs	TIF Management	100R
Property Files Upload	Redevelopment	Collective Bargaining Reporting
Other Post-Employment Benefits	Economic Development Reporting	CBR Contract Upload

Select Budgets

6

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 7

**Select Unit**

Gateway INDIANA  
for government units  
An Information for Indiana Data Site  
Department of Local Government Finance

Select Unit  
Select Unit from List  
Currently Viewing Year: 2015

Click a link below to select your unit.

Unit Code	Unit Name Link	Unit Type	Unit County
0417	<a href="#">Portland Civil City</a>	City/Town	Jay

7

Slide 8

**Unit Main Menu**

Gateway INDIANA  
for government units  
An Information for Indiana Data Site  
Department of Local Government Finance

Select Unit > Unit Main Menu  
Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

Unit Main Menu - 0417 Portland Civil City, Jay Co.  
Select from the options below to customize your unit's funds, departments, and/or publications.

Department of Local Government Finance Tasks


- Customize Funds, Departments, Debts, Rev. Codes  
View and edit lists of funds, depts., debts by fund and rev. codes.
- View Forms, Enter and Edit Budgets  
View, edit and submit Forms to DLGF.
- County Council Review Worksheet  
Has Not Been Submitted  
View and edit the worksheet for the selected unit. Due September 2nd
- Submit Proof of Publication and Signed Form 4  
View, upload and submit budget-related documents to DLGF.
- Optional Flat File Upload  
Fund List, Department List, Fund-Dept Relationship, Form 1, Form 2

8



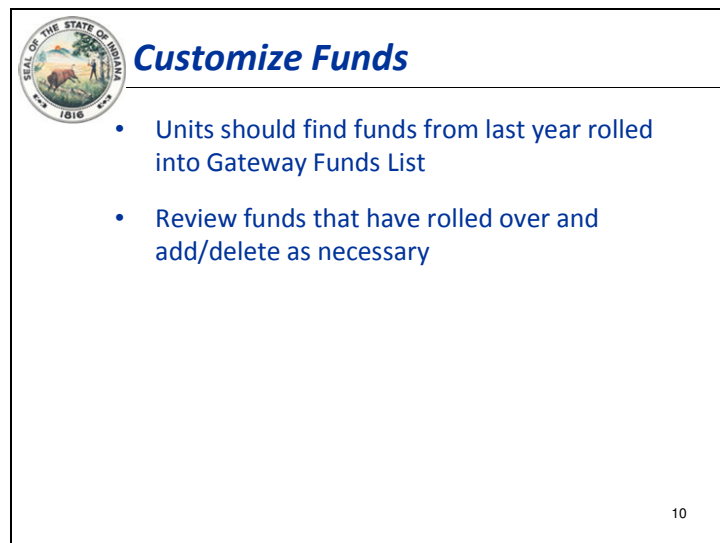
## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 9



The screenshot shows the 'Gateway Indiana' website interface. At the top left is the Seal of the State of Indiana. The main header reads 'Gateway INDIANA for government units' and 'An Information for Indiana Data Site'. Below this is a navigation bar with links: Home, About, Account Settings, Help, and Logout. The page title is 'Customize Unit'. The breadcrumb trail shows 'Select Unit > Unit Menu > Customize Unit'. The selected year is 2015 and the selected unit is Jay County - 0417 Portland Civil City, Jay Co. The page is titled 'Customize Funds/Depts./Rev.Codes/Debts Lists - Portland Civil City, Jay Co.' and instructs users to select from options below to customize their unit's funds, departments, and/or index list of departments by fund. A green bar highlights the 'Customize Funds and Department Lists' section. Below this, there are four links: 'Customize Funds List', 'Customize Revenue Codes List', 'Customize Departments List', and 'Customize Debts by Fund List'. Each link has a red icon and a brief description of its function. The page number '9' is in the bottom right corner.


Slide 10




The screenshot shows the 'Gateway Indiana' website interface. At the top left is the Seal of the State of Indiana. The main header reads 'Gateway INDIANA for government units' and 'An Information for Indiana Data Site'. Below this is a navigation bar with links: Home, About, Account Settings, Help, and Logout. The page title is 'Customize Funds'. The breadcrumb trail shows 'Select Unit > Unit Menu > Customize Unit'. The selected year is 2015 and the selected unit is Jay County - 0417 Portland Civil City, Jay Co. The page is titled 'Customize Funds/Depts./Rev.Codes/Debts Lists - Portland Civil City, Jay Co.' and instructs users to select from options below to customize their unit's funds, departments, and/or index list of departments by fund. A green bar highlights the 'Customize Funds and Department Lists' section. Below this, there are four links: 'Customize Funds List', 'Customize Revenue Codes List', 'Customize Departments List', and 'Customize Debts by Fund List'. Each link has a red icon and a brief description of its function. The page number '10' is in the bottom right corner.

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 11



## Customize Funds



for government units

Indiana

An Information for Indiana Data Site

Department of Local Government Finance

Home About Account Settings Help Logout

[Select Unit](#) > [Unit Main Menu](#) > [Customize Unit](#) > [Customize Funds](#)

Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

### Funds List - 0417 Portland Civil City, Jay Co.

Click on a column header to sort column.


Fund Code	Fund Name Link	Remove Fund
0001	Rainy Day	X
0101	General	X
0706	Local Road & Street	X
0708	Motor Vehicle Highway	X
1301	Park & Recreation	X
1380	Park Bond	X
2391	Cumulative Capital Development	X
9501	Local Option Income Tax Public Safety	X

[Add a Fund](#)

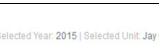
[Add a New Home Ruled Fund](#)

11

Slide 12



## Customize Departments



for government units

Indiana

An Information for Indiana Data Site

Department of Local Government Finance

Home About Account Settings Help Logout

Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

### Departments List for Portland Civil City, Jay Co.

Department Code	Department Name	Remove Dept.
0041	Clerk-Treasurer (City/Town Units Only)	X
0044	Mayor	X
0069	City Council/Town Board (Common Council)	X
0079	Plan Commission	X
0248	City/Town Court (City Judge/Judge)	X
0362	Fire Department	X
0370	Police Department (Town Marshall)	X


[Add a New Department](#)

[Add a New Home Ruled Department](#)

- Not all units are departmentalized
- If applicable, departments rollover from the previous year <sup>12</sup>

## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 13



### Customize Departments by Fund List


Selected Unit: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

Click the "Pencil and Paper" Icon to link departments to each fund

Funds Descriptions	Edit Departments	Departments
0061 - RAINY DAY		0000 - NO DEPARTMENT
0101 - GENERAL		0041 - CLERK-TREASURER (CITY/TOWN UNITS ONLY) 0044 - MAYOR 0069 - CITY COUNCIL/TOWN BOARD (COMMON COUNCIL) 0079 - PLAN COMMISSION 0248 - CITY/TOWN COURT (CITY JUDGE/JUDGE)
0706 - LOCAL ROAD & STREET		0000 - NO DEPARTMENT
0708 - MOTOR VEHICLE HIGHWAY		0000 - NO DEPARTMENT

- All fund/department linkages from last year with line items entered in Form 1, should have rolled over.
- Fund/Departments linkages without line items entered on Form 1 may have been removed from the Customize Departments by Fund List.

Slide 14



### Customize Departments by Fund List

Funds and departments (program accounts) need to be linked together in order to set up Forms 1 and 4A for departmentalized units.

Check boxes to link departments to the fund

Custom Departments by Fund

Selected Unit: 0417 Portland Civil City, Jay Co.

Selected Year: 2015

Available Departments:

☐ Check/Uncheck All

- ☒ 0041 - CLERK-TREASURER (CITY/TOWN UNITS ONLY)
- ☒ 0044 - MAYOR
- ☒ 0069 - CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)
- ☒ 0079 - PLAN COMMISSION
- ☒ 0248 - CITY/TOWN COURT (CITY JUDGE/JUDGE)
- ☐ 0362 - FIRE DEPARTMENT
- ☒ 0370 - POLICE DEPARTMENT (TOWN MARSHAL)

Cancel Update Record

Click "Update Record" when finished

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 15

**Customize Revenues by Funds**

Gateway for government units

Home About Account Settings Help Logout

Select Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

Customize Revenue Codes Lists to Funds

Click to add revenue

Select revenue code category

Revenues rollover from the previous year

15

Slide 16

**Customize Revenues by Funds**

Revenue Codes and funds need to be linked to set up the Form 2

Choose revenue code


Check boxes for funds receiving the revenue

Click "Update Record" when finished

16

## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 17



### Customize Debts by Fund List

Debt/Fund linkages should rollover from last year, unless they have been marked as retired


[Home](#) [About](#) [Account Settings](#) [Help](#) [Logout](#) Department of Local Government Finance

Select Unit > Unit Main Menu > Customize Unit > Customize Debts by Fund

Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

#### Customize Debts by Funds


Debts are available as listed under the Debt Management application. Each debt may be attached to only one fund per year.

Fund Descriptions	EDIT DEBTS	DEBTS
1380 - PARK BOND		Park Bond

Click the "Pencil and Paper" icon to link debts to the debt service fund

17

Slide 18



### Customize Debts by Fund List

Similar to departments and revenues, debts need to be linked to funds to set up the Debt Worksheet

#### Customize Debts by Fund

Selected Unit: 0417 Portland Civil City, Jay Co.  
Selected Year: 2015

Available Debts:

☐ Check/Uncheck All

- ☒ Park Bond
- ☐ Redevelopment District Tax Increment Revenue Bonds, Series 2007 B
- ☐ Redevelopment District Tax Increment Revenue Bonds, Series 2007 A
- ☐ Sewage Works Revenue Bonds of 2012, Series A (SRF)
- ☐ Fees
- ☒ Anticipated Debt Service

[Cancel](#) [Update Record](#)

Check boxes for debts to be repaid from the selected fund

Click "Update Record" when finished

18

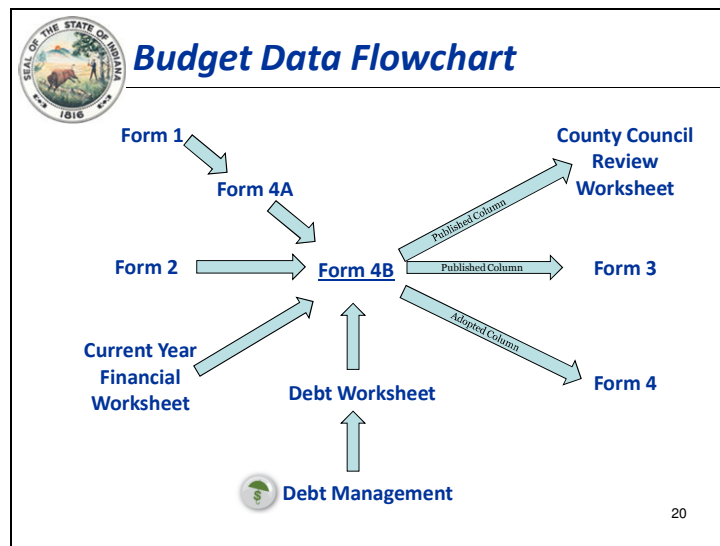
# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 19

The screenshot shows the 'Budget Form Menu' interface. At the top left is the Seal of the State of Indiana. The header includes 'Indiana Gateway for government units' and 'Department of Local Government Finance'. A red arrow points to a 'Click for User Guides' button. A green arrow points to a 'Click to View Budget Forms Flow Chart' link. Below the header, it says 'Select from Available Forms'. A yellow box contains a list of forms: 'Current Year Financial Worksheet: Additional Calculations for Form 4B', 'Debt Worksheet', 'Form 1: Budget Estimate', 'Form 2: Estimate of Miscellaneous Revenues', 'Form 3: Notice to Taxpayers', 'Form 4: Ordinance / Resolution of Appropriations and Tax Rates', 'Form 4A: Budget Report', 'Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate', and '1782 Recipients: Registration of 1782 Notice E-mail Recipients'. A red arrow points to the 'Click to edit form' link next to the first item. A green arrow points to the 'New Flow Chart Link' text.


19

Slide 20



## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 21




### Form 1: Budget Estimate

- All line items except Capital Outlays have been carried over from the previous year
- Linkages between fund and departments have been carried over where line items were previously entered
- New feature to copy all published amounts, for all funds, to the adopted column

21

Slide 22



### Form 1: Budget Estimate

Department of Local Government Finance

Click Here for Print/View Options

Prescribed by Department of Local Government Finance  
Approved by State Board of Accounts

BUDGET ESTIMATE FOR

Select Fund:  
0101 - GENERAL

Select Department:  
0370 POLICE DEPARTMENT (TOWN MARSHALL)

Select Category Tab


Personal Services | **Supplies** | Services And Charges | Capital Outlays | Debt Service

Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount
X	Salaries and Wages	111	Police Regular Wage	\$	\$
X	Salaries and Wages	111-1	Radio Operators Reg	\$	\$
X	Salaries and Wages	112	Police Parttime	\$	\$
X	Salaries and Wages	112-1	Radio Op Parttime	\$	\$
X	Other Personal Services	120	Applicant's Exams	\$	\$
X	Other Personal Services	154	Clothing Allowance	\$	\$
+ ADD	Salaries And Wages	Op.		\$	\$

22

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 23



## Form 1: Saving Amounts

Home About Account Settings Help Logout
Department of Local Government Finance

Click Here for Print/View Options

Prescribed by Department of Local Government Finance  
Approved by State Board of Accounts

BUDGET ESTIMATE FOR

Select Fund: 0101 - GENERAL

Select Department: 0370 POLICE DEPARTMENT (TOWN MARSHALL)

Select Category Tab

Personal Services

Supplies

Services And Charges

Capital Outlays


Data Service

Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount
X	Communication and Transportation	321	Communication & T	\$ 25,000	\$
X	Utility Services	322	Utility Services	\$ 10,000	\$
X	Printing and Advertising	324	Printing & Advertising	\$ 600	\$
X	Repairs and Maintenance	325	Repairs & Maintenance	\$ 35,000	\$
X	Professional Services	326	Other Contractual Ser	\$ 10,000	\$
+ ADD					
TOTALS BY CATEGORY				total \$ 90,600	total \$ 0
TOTALS BY DEPT BY FUND				total \$ 945,611	total \$ 0
TOTALS BY FUND				total \$ 3,500,834	total \$ 0
TOTALS BY UNIT				total \$ 4,978,466	total \$ 0

Click "Save" after entering your amounts

23

Slide 24



## Form 1: Adding Line Items

Home About Account Settings Help Logout
Department of Local Government Finance

Click Here for Print/View Options

Prescribed by Department of Local Government Finance  
Approved by State Board of Accounts

Budget Form No. 1

Select Fund: 0101 - GENERAL

Select Department: 0370 POLICE DEPARTMENT (TOWN MARSHALL)

Select your sub-category, enter a line item code, description and amount

Personal Services

Supplies

Services And Charges

Capital Outlays

Data Service

Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount
Machinery, Equipment, And Vehicle	472	Dispatch Radio	\$ 0700	
+ ADD				
TOTALS BY DEPT BY FUND				total \$ 945,611
TOTALS BY FUND				total \$ 3,500,834
TOTALS BY UNIT				total \$ 4,978,466

Click "+ ADD" button after entering your new line item

24



# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 25

 **Exporting/Printing the Form 1**

**Gateway**  
for government units  
An Information for Indiana Data Site  
Local Government Finance Department of

Home About Account Settings Help Logout

Click Here for Print/View Options

Print/View Form 1 for Selected Fund in All Formats  
Print/View Form 1 for All Funds for Selected Unit in All Formats

Prescribed by Department of Local Government Finance  
Approved by State Board of Accounts

RUDGET F1 FORM FOR

Select Fund:  
6301 - TRANSPORTATION

Select Department:  
2700 Student Transportation


Copy ALL Published Amounts for ALL Funds

Select Category Tab

Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount
X	Operating Supplies	27010	Transportation supply	\$ 3,000	\$
X	Operating Supplies	27300	Fuel	\$ 100,000	\$
X	Repair and Maintenance Supplies	27300	Bus Maint supplies	\$ 80,000	\$
+	Office Supplies				
TOTALS BY CATEGORY				Total \$ 183,000	Total \$ 0
TOTALS BY DEPT BY FUND				Total \$ 183,000	Total \$ 0
TOTALS BY FUND				Total \$ 183,000	Total \$ 0

25

Slide 26

 **Exporting/Printing the Form 1**

Printed by the Department of Local Government Finance  
Approved by the State Board of Accounts

Budget Form 1 - Budget Estimate  
Year: 2014 County: Jay Unit: Portland Civil City


PDF, the web report, data  
CSV (comma delimited)  
PDF  
HTML (web archive)  
Excel  
TIF file

Form 1 can be exported into Excel and other formats

Fund	Department	Category	Line Item Code	Line Item	Published	Adopted
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	PERSONAL SERVICES	111	Regular Salary	\$67,455	\$67,455
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	PERSONAL SERVICES	113	OAS	\$61,000	\$61,000
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	PERSONAL SERVICES	114	PERF	\$234,860	\$234,860
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	PERSONAL SERVICES	115	Unemployment	\$17,000	\$17,000
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	PERSONAL SERVICES	116	Insurance	\$395,875	\$395,875
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	PERSONAL SERVICES	117	Workman's Compensation	\$51,000	\$51,000
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	PERSONAL SERVICES	118	Medicare	\$27,000	\$27,000
PERSONAL SERVICES Total					\$614,290	\$614,290
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	SUPPLIES	230	Office Supplies	\$5,000	\$5,000
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	SUPPLIES	237	Other Supplies	\$1,000	\$1,000
SUPPLIES Total					\$6,000	\$6,000
0101 - GENERAL	CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)	SERVICES AND CHARGES	326	Other Contractual Services	\$92,000	\$92,000

## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 27



### Form 1: Budget Estimate

All published amounts, for all funds, can now be easily copied to the adopted column

BUDGET ESTIMATE FOR

Select Fund: 1301 - PARK & RECREATION


Select Department: 0000 NO DEPARTMENT

Select Category Tab

Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount
X	Operating Supplies	232	Gas	\$ 10,000	\$ 10,000
X	Operating Supplies	235	Pool Supplies	\$ 20,000	\$ 20,000
X	Office Supplies	236	Office Supplies	\$ 300	\$ 300
X	Other Supplies	237	Other Supplies	\$ 3,500	\$ 3,500
+ ADD					
Office Supplies					
TOTALS BY CATEGORY				Total \$ 33,800	Total \$ 33,800
TOTALS BY DEPT BY FUND				Total \$ 295,500	Total \$ 295,500
TOTALS BY FUND				Total \$ 295,500	Total \$ 295,500
TOTALS BY UNIT				Total \$ 4,981,986	Total \$ 4,981,986

Form values saved at 03:53 PM and 16 seconds. [SAVE](#)

Slide 28




### Form 2: Estimate of Misc. Revenues

- While Form 2 has not changed, it is important to review the revenues carried over from last year
- Adding/deleting revenues occurs in "Customize Revenue" section, whereas entering amounts of revenues occurs on the Form 2 directly
- Column B has been removed for R105 LOIT Levy Freeze and R123 CAGIT Property Tax Replacement Credit

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 29

 **Form 2: Estimate of Misc. Revenues**

Department of Local Government Finance

Click Here for Print/View Options

Prescribed by Department of Local Government Finance  
Approved by State Board of Accounts

ESTIMATE OF MISCELLANEOUS REVENUES  
FROM SOURCES OTHER THAN GENERAL PROPERTY TAXES  
FOR USE IN PREPARATION OF ESTIMATE OF FUNDS TO BE RAISED, YEAR 2015

Select Fund:  
0101 - GENERAL


Select Category Tab

**Revenues can be added/deleted in "Customize Revenue"**

Revenue Code	Description	July 1 to Dec 31, 2014	Jan 1 to Dec 31, 2015
R102	County Adjusted Gross Income Tax (CAGIT) Certified Shares	\$	\$
R105	Local Option Income Tax (LOIT) for Levy Freeze	\$	\$
R107	Innkeepers Tax	\$	\$
R109	Alcoholic beverages/liquor excise tax distribution	\$	\$
R111	Cigarette Tax Distribution	\$	\$
R112	Financial Institution Tax distribution	\$	\$
R114	Motor Vehicle/Boat/Excise Tax Distribution	\$	\$
R123	County Adjusted Gross Income Tax (CAGIT) property tax replacement Credit	\$	\$

29

Slide 30

 **Form 2: Saving Amounts**

Department of Local Government Finance

Click Here for Print/View Options

Prescribed by Department of Local Government Finance  
Approved by State Board of Accounts

ESTIMATE OF MISCELLANEOUS REVENUES  
FROM SOURCES OTHER THAN GENERAL PROPERTY TAXES  
FOR USE IN PREPARATION OF ESTIMATE OF FUNDS TO BE RAISED, YEAR 2015

Select Fund:  
0101 - GENERAL

Select Category Tab

**Enter amounts for both time periods**

Revenue Code	Description	July 1 to Dec 31, 2014	Jan 1 to Dec 31, 2015
R203	Planning, Zoning, and Building Permits and Fees	\$ 10,000	\$ 20,000
R210	Cable TV Licenses	\$ 22,000	\$ 40,000
<b>TOTALS BY CATEGORY</b>		<b>Total \$ 32,000</b>	<b>Total \$ 60,000</b>
<b>TOTALS BY FUND</b>		<b>Total \$ 32,000</b>	<b>Total \$ 60,000</b>
<b>TOTALS BY UNIT</b>		<b>Total \$ 32,000</b>	<b>Total \$ 60,000</b>


Form values saved at 04:12 PM and 37 seconds.

**Click "Save" after entering amounts**

30

## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 31




### Form 4A: Budget Report


- Form 4A is very easy to complete after entering data in Form 1
- Whenever a change/correction is made to Form 1, be sure to re-pull the data into Form 4A
- This will often consist of pulling in the Form 1 published amounts initially and then re-pulling data once the adopted amounts are entered


31

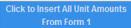
Slide 32



### Form 4A: Pulling in Data

Budget Report 


Click to pull all data from Form 1 

Click to Insert All Unit Amounts From Form 1 

Select Fund: 0101 GENERAL


Select Department: 0069 CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)

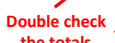
DEPARTMENT: 0069 CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)				
	Published Amount		Adopted Amount	
PERSONAL SERVICES	\$ 1,310,434		\$ 1,310,434	
SUPPLIES	\$ 6,000		\$ 6,000	
OTHER SERVICES AND CHARGES	\$ 488,500		\$ 488,500	
CAPITAL OUTLAY	\$ 40,000		\$ 40,000	
DEBT SERVICE	\$ 0		\$ 0	
TOTAL	\$ 1,844,934		\$ 1,844,934	

Copy 

Totals by Fund	
Published Amount Total: \$ 3,492,334	Adopted Amount Total: \$ 3,492,334

Totals by Unit	
Published Amount Total: \$ 1,844,934	Adopted Amount Total: \$ 1,844,934


Form values saved at 04:14 PM and 53 seconds. 

Double check the totals 

32

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 33

 **Current Year Financial Worksheet**

Formerly called "Line 2 Worksheet"

Select Fund: 0101 - GENERAL ← Select Fund


Line 2	
<b>APPROPRIATIONS</b>	
1. Current Year Approved Budget	\$ 3,238,396
2. Encumbrances brought forward	\$ 62,299
3. Changes to Appropriations:	
a) Additional Appropriations (January to June)	\$ 0
b) Reductions January through June	\$ 0
4. Other Non-Appropriated Obligations	\$ 0
5. Total Approved Appropriations	\$ 3,301,097
<b>DISBURSEMENTS</b>	
6. January through June Current Year Disbursements	\$ 1,451,410
7. Appropriation Balance	\$ 1,850,287
8. Estimated Current Year Expenditures July through December	\$ 1,850,287
<b>Line 3</b>	
10. Processed/Approved Additional Appropriations for July through Dec. of Current Year	\$ 0
<b>Line 4A</b>	
11. Line excess not transferred prior to June 30	\$ 0
12. Temporary Loans outstanding as of June 30	\$ 0
What fund loaned the cash on Line 12?	
13. Temporary loans not included in Lines 2 or 3	\$ 0
<b>Line 4B</b>	
14. Temp loans to be repaid in the first six months of ensuing year	\$ 0
What fund loaned the cash on Line 14?	
<b>Line 5</b>	
15. June 30 Cash Balance, including investments	\$ 13,76070
<b>Line 7</b>	
16. Taxes to be collected, present year (December settlement)	\$ 67,7417

Funds values saved at 09:42 PM and 30 seconds. SAVE

33

Enter data and save

Slide 34

 **Debt Worksheet**

**Gateway**  
for government units  
An Information for Indiana Data Site  
Department of Local Government Finance

Select Unit: Unit Main Menu • Budget Form Menu • Debt Worksheet

Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland City, Jay Co.

Click Here for Print/View Options

Prescribed by Department of Local Government Finance

DEBT WORKSHEET

Select fund: 1380 - PARK BOND ← Select fund

(This form is to be prepared for each debt service fund that requires either a tax rate or an appropriation. Debt service funds designated by an "0" in the third digit of the fund code.)


Name of Issue	Line 2 Due	Line 2 Amount	Line 1 Due	Line 1 Amount	Line 1.1 Due	Line 1.1 Amount
Park Bond		\$ 0		\$ 0		\$ 0
Anticipated Loan Service		\$ 0		\$ 0		\$ 0
TOTALS BY FUND		\$ 0		\$ 0		\$ 0
TOTALS BY UNIT		\$ 0		\$ 0		\$ 0

Click on the debt name

34

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 35



## Debt Worksheet

DEBT WORKSHEET DATA ENTRY

Selected Year: 2015  
Selected County: Jay County  
Selected Unit: Portland Civil City  
Selected Fund: 1300 Park Bond

(This form is to be prepared for each debt service fund that requires either a tax rate or an appropriation. Debt service funds designated by an "0" in the third digit of the fund code.)

Selected Debt: Park Bond


[Click Here to Refresh All Values from Debt Management](#)  
(WARNING: All item selections will be removed on data update)

Date	Period	Trunc Fee	Lease Pmts.	Total	Line 2 07/01/2014 to 12/31/2014	Line 1 01/01/2015 to 12/31/2015	Line 11 01/01/2016 to 06/30/2016
6/29/2010				0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1/15/2011		24,508		24,508	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7/15/2011		31,508		31,508	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1/15/2012		66,508		66,508	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7/15/2012		31,158		31,158	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1/15/2013		86,158		86,158	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7/15/2013		30,608		30,608	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1/15/2014		90,608		90,608	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7/15/2014		30,008		30,008	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1/15/2015		90,000		90,000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7/15/2015		29,258		29,258	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1/15/2016		89,258		89,258	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7/15/2016		38,448		38,448	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1/15/2017		98,448		98,448	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TOTALS BY DEBT</b>					\$ 30,008	\$ 115,266	\$ 117,258
<b>TOTALS BY FUND</b>					\$ 30,008	\$ 115,266	\$ 117,258
<b>TOTALS BY UNIT</b>					\$ 30,008	\$ 115,266	\$ 117,258

FORM VALUES SAVED AT 04:10 PM AND 37 SECS

Save
35

Slide 36



## Debt Worksheet

DEBT WORKSHEET

Prescribed by Department of Local Government Finance

Selected Year: 2015  
Selected County: Jay County  
Selected Unit: Portland Civil City  
Select Fund:  
1300 - PARK BOND

(This form is to be prepared for each debt service fund that requires either a tax rate or an appropriation. Debt service funds designated by an "0" in the third digit of the fund code.)


[Click Here for Print/View Options](#)

Name of Issue	Line 2 Due	Line 2 Amount	Line 1 Due	Line 1 Amount	Line 11 Due	Line 11 Amount
Park Bond	07/15/2014	\$ 30,008	07/15/2015	\$ 115,266	01/15/2016	\$ 117,258
Anticipated Debt Service		\$ 0		\$ 60,000		\$ 28,000
<b>TOTALS BY FUND</b>		\$ 30,008		\$ 175,266		\$ 117,258
<b>TOTALS BY UNIT</b>		\$ 30,008		\$ 175,266		\$ 117,258

36

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 37

 **Form 4B: Budget Estimate, Financial Statement, and Proposed Tax Rate**

**Select fund** → **BUDGET ESTIMATE - FINANCIAL STATEMENT - PROPOSED TAX RATE**

Select Fund: 0101 - GENERAL

**Click to Copy All Published Amounts to Adopted for All Funds**

**The selected fund does not currently have data in both published and adopted columns. Form 4B requires data in both published and adopted columns for all funds before it can be marked 'Ready to Submit'**

**Net Assessed Value** \$ 175,000,000

**Warning:** If there is currently no data in this unit's Financial Worksheet, Debt Worksheet, Form 2 or Form 4a, filling from those forms can result in zero fill values and lost data. To avoid this, please only use the "Click here to insert" buttons once these related forms are completed.

**Click Here to Insert Finan. Wksht, Debt Wksht, Form 2 & Form 4a published amounts**


**Click Here to Insert Finan. Wksht, Debt Wksht, Form 2 & Form 4a adopted amounts**

Funds Required For Expenses To December 31st Of Incoming Year	Published Amount	Adopted Amount
1. Total budget estimate for incoming year	\$	\$
2. Necessary expenditures, July 1 to December 31 of present year, to be made from appropriation unexpended	\$	\$

**Enter Net Assessed Value for fund**

37

Slide 38

 **Form 4B: Budget Estimate, Financial Statement, and Proposed Tax Rate**

**Pull data from other forms** → **Click Here to Insert Finan. Wksht, Debt Wksht, Form 2 & Form 4a published amounts**

**Net Assessed Value** \$ 175,000,000

**Warning:** If there is currently no data in this unit's Financial Worksheet, Debt Worksheet, Form 2 or Form 4a, filling from those forms can result in zero fill values and lost data. To avoid this, please only use the "Click here to insert" buttons once these related forms are completed.

**Click Here to Insert Finan. Wksht, Debt Wksht, Form 2 & Form 4a adopted amounts**

Funds Required For Expenses To December 31st Of Incoming Year	Published Amount	Adopted Amount
1. Total budget estimate for incoming year	\$ 3,492,334	\$ 0
2. Necessary expenditures, July 1 to December 31 of present year, to be made from appropriation unexpended	\$ 2,081,641	\$ 0
3. Additional appropriation necessary to be made July 1 to December 31 of present year	\$ 0	\$ 0
4. Outstanding temporary loans:		
a). To be paid not included in lines 2 or 3	\$ 0	\$ 0
b). Not repaid by December 31 of present year	\$ 0	\$ 0
5. TOTAL FUNDS required (add lines 1,2,3,4a and 4b)	\$ 5,573,975	\$ 0

**Copy**


Funds On Hand To Be Received From Sources Other Than Proposed Tax Levy	Published Amount	Adopted Amount
6. Actual cash balance, June 30 of present year (including cash investments)	\$ 1,924,370	\$ 0
7. Taxes to be collected, present year (December settlement)	\$ 716,446	\$ 0
8. Miscellaneous revenue to be received July 1 of present year to December 31 of incoming year (Schedule on File):		
a). Total Column A Budget Form 2	\$ 632,265	\$ 0
b). Total Column B Budget Form 2	\$ 983,104	\$ 0
9. TOTAL FUNDS (add lines 6, 7, 8a and 8b)	\$ 4,256,175	\$ 0
10. Net amount to be raised for expenses to December 31 of incoming year (deduct line 9 from 5)	\$ 1,317,800	\$ 0

**Copy**

38

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 39

 **Form 4B: Budget Estimate, Financial Statement, and Proposed Tax Rate**


10. Net amount to be raised for expenses to December 31 of incoming year (deduct line 9 from 5)	\$ 1,317,800	\$ 0
<input checked="" type="radio"/> I want to make my own calculations for this Form 4B <input type="radio"/> I want to use the Gateway Calculator		
<small>I acknowledge that I am responsible for verifying the accuracy of the information submitted to the Department through the Gateway website. I acknowledge that neither the Department of Local Government Finance nor the Indiana Business Research Center is liable for the calculations performed by the Gateway calculator.</small>		
<b>Proposed Tax Rate and Levy</b>		
11. Operating balance (not in excess of expense January 1 to June 30, less miscellaneous revenue for same period)	\$ 250,000	\$ 0
12. Amount to be raised by tax levy (add lines 10 and 11)	\$ 1,567,800	\$ 0
13a. Property Tax Replacement Credit from Local Option Tax	\$ 0	\$ 0
13b. Operating LOIT	\$ 0	\$ 0
14. NET AMOUNT TO BE RAISED BY TAX LEVY (deduct line 13a and 13b from line 12)	\$ 1,567,800	\$ 0
15. Levy Excess Fund applied to current budget	\$ 0	\$ 0
16. Net amount to be raised	\$ 1,567,800	\$ 0
17. Net Tax Rate on each one hundred dollars of taxable property	0.0959	0.0000

Form values saved at 08:06 AM and 00 seconds

Manually enter data in lines 11-17 and save...

39

Slide 40

 **Form 4B: Budget Estimate, Financial Statement, and Proposed Tax Rate**

...or have the Gateway Calculator help!

Enter the selected field and save


10. Net amount to be raised for expenses to December 31 of incoming year (deduct line 9 from 5)	\$ 1,317,800	\$ 0
<input type="radio"/> I want to make my own calculations for this Form 4B <input checked="" type="radio"/> I want to use the Gateway Calculator		
<small>I acknowledge that I am responsible for verifying the accuracy of the information submitted to the Department through the Gateway website. I acknowledge that neither the Department of Local Government Finance nor the Indiana Business Research Center is liable for the calculations performed by the Gateway calculator.</small>		
<b>Proposed Tax Rate and Levy</b>		
11. Operating balance (not in excess of expense January 1 to June 30, less miscellaneous revenue for same period)	\$	\$ 0
12. Amount to be raised by tax levy (add lines 10 and 11)	\$	\$ 0
13a. Property Tax Replacement Credit from Local Option Tax	\$	\$ 0
13b. Operating LOIT	\$	\$ 0
14. NET AMOUNT TO BE RAISED BY TAX LEVY (deduct line 13a and 13b from line 12)	\$	\$ 0
15. Levy Excess Fund applied to current budget	\$	\$ 0
16. Net amount to be raised	\$ 1,567,800	\$ 0
17. Net Tax Rate on each one hundred dollars of taxable property		0.0000

Save/Calculate



# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 41



## Form 4B: Populating the Adopted Column

**All published amounts for all funds can now be copied to the adopted column with a single click!**

BUDGET ESTIMATE - FINANCIAL STATEMENT - PROPOSED TAX RATE

Select Fund: 0101 - GENERAL

This fund has data in both published and adopted columns.

Form 4B requires data in both published and adopted columns for all funds before it can be marked 'Ready to Submit'.

Net Assessed Value: \$ 175,000,000

Warning: If there is currently no data in this unit's Financial Worksheet, Debt Worksheet, Form 2 or Form 4a, filing from those forms can result in zero fill values and lost data. To avoid this, please only use the 'Click here to insert' buttons once these related forms are completed.


Click Here to Insert Finan. Worksheet, Debt Worksheet, Form 2 & Form 4a published amounts

Click Here to Insert Finan. Worksheet, Debt Worksheet, Form 2 & Form 4a adopted amounts


Funds Required For Expenses To December 31st Of Incoming Year	Published Amount	Adopted Amount
1. Total budget estimate for incoming year	\$ 3,492,334	\$ 3,492,334
2. Necessary expenditures, July 1 to December 31 of present year, to be made from appropriation unexpended	\$ 2,081,641	\$ 2,081,641
3. Additional appropriation necessary to be made July 1 to December 31 of present year	\$ 0	\$ 0
4. Outstanding temporary loans: a) To be paid not included in lines 2 or 3 b) Not repaid by December 31 of present year	\$ 0 \$ 0	\$ 0 \$ 0
5. TOTAL FUNDS required (add lines 1,2,3,4a and 4b)	\$ 5,573,975	\$ 5,573,975

Copy

Slide 42



## Error Prevention Report



INDIANA Gateway for government units

An Information for Indiana Data Site

Home About Account Settings Help Logout

Department of Local Government Finance

Select Unit: Unit Main Menu > Budget Form Menu

Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

Click to View Budget Forms Flow Chart

Select from Available Forms

Click to view the Error Prevention Report

Error Prevention Report

Click to review common errors.

Current Year Financial Worksheet: Additional Calculations for Form 4B

Click to edit form

Not Ready to Submit

Debt Worksheet

Form 1: Budget Estimate

Form 2: Estimate of Miscellaneous Revenues

Form 3: Notice to Taxpayers


Form 4: Ordinance / Resolution of Appropriations and Tax Rates

Form 4A: Budget Report

Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 43



## Error Prevention Report

**Gateway**  
for government units  
An Information for Indiana Data Site

[Selected Unit](#) • [Unit Main Menu](#) • [Budget Form Menu](#) • **Error Prevention Report**  
Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.  
Selected Year: 2015  
Selected County: 38 - Jay County  
Selected Unit: Portland Civil City  
[Click Here for Print/View Options for entire unit](#)

**New printing feature!**

**Now checks for errors automatically!**


**Error Prevention Report**  
Please take the time to address the following issues as they frequently indicate errors. Once an issue is corrected, it will be removed from the list. This tool will not find all possible mistakes, but is designed to catch the most common ones. For assistance resolving these issues, please contact the DLSF at [edlsway@idof.in.gov](mailto:edlsway@idof.in.gov) or 317-232-3777.  
Some errors will appear if the forms are not yet complete.

**Click to view the affected funds**

Form / Error #	Error	Details	Funds Affected
CYFW / 29	Line 16 does not equal Line 7, published column, Form 4B.	Line 16 "Taxes to be collected, present year (December settlement)" on the Current Year Financial Worksheet does not equal Line 7 "Taxes to be collected, present year (December settlement)" on the published column of the Form 4B. Please check the following funds:	1 fund(s) affected
F2 / 9	Col. A fund total does not equal Line 8a, published column, Form 4B.	Revenues July 1 - December 31, 2013 reported in Column A of the Form 2 do not equal Line 8a in the published column of the Form 4B. Please check the following funds:	1 fund(s) affected
F2 / 11	Col. B fund total does not equal Line 8b, published column, Form 4B.	Revenues January 1 - December 31, 2014 reported in Column B of the Form 2 do not equal Line 8b in the published column of the Form 4B. Please check the following funds:	1 fund(s) affected

43

Slide 44



## Error Prevention Report

**Error Prevention Report**  
Please take the time to address the following issues as they frequently indicate errors. Once an issue is corrected, it will be removed from the list. This tool will not find all possible mistakes, but is designed to catch the most common ones. For assistance resolving these issues, please contact the DLSF at [edlsway@idof.in.gov](mailto:edlsway@idof.in.gov) or 317-232-3777.  
Some errors will appear if the forms are not yet complete.

**Funds with Errors:**  
0101: GENERAL | CYFW Line 9: 1850287 | Form4B Published: 1896260  
[Done](#)


**Please check for errors before:**

- Advertising
- Submitting the County Council Review Worksheet
- Adopting
- Submitting

44

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 45

 **County Council Review Worksheet**

County Council Review Worksheet  
Budget Year 2014

The County Council Review Worksheet is **NOT SUBMITTED** for Portland Civil City

State Growth Quotient: 2.63 2012 May 2013 2013 May 2014  
County Growth Quotient: 1.40 2012 May 2013 2013 May 2014

Click to pull in values from Form 48

Copy All Fund Data From Form 48


Or manually enter amounts

Fund Code	Fund Name	2012 May 2013 Certified	2013 May 2014 Certified	May % Change	Action
0061	RAINY DAY	\$367,659,097	\$323,540,005	-12.00%	Edit
0101	GENERAL	\$367,659,097	\$323,540,005	-12.00%	Edit
0180	DEBT SERVICE	\$367,659,097	\$323,540,005	-12.00%	Edit
1214	CAPITAL PROJECTS (School)	\$367,659,097	\$362,144,210	-1.50%	Edit
6301	TRANSPORTATION	\$367,659,097	\$323,540,005	-12.00%	Edit
6302	BUS REPLACEMENT	\$367,659,097	\$323,540,005	-12.00%	Edit

Fund Code	Fund Name	2013 Certified Budget	2014 Proposed Budget	% Change, 2013-2014	Difference - State Growth Quotient	Difference - County Growth Quotient	Action
0061	RAINY DAY	\$200,000	\$200,000	0.00%	-2.60%	-2.20%	Edit
0101	GENERAL	\$6,900,000	\$7,200,000	4.35%	1.75%	2.15%	Edit
0180	DEBT SERVICE	\$1,065,089	\$1,118,953	5.00%	2.40%	2.80%	Edit
1214	CAPITAL PROJECTS (School)	\$957,210	\$1,930,481	101.68%	99.08%	99.48%	Edit
6301	TRANSPORTATION	\$728,516	\$788,800	8.27%	5.67%	6.07%	Edit
6302	BUS REPLACEMENT	\$176,600	\$232,800	31.82%	29.22%	29.62%	Edit

45

Slide 46

 **County Council Review Worksheet**

County Council Review Worksheet  
Budget Year 2014

The County Council Review Worksheet is **NOT SUBMITTED** for Portland Civil City

State Growth Quotient: 2.63 2012 May 2013 2013 May 2014  
County Growth Quotient: 1.40 2012 May 2013 2013 May 2014

Copy All Fund Data From Form 48

Submit by September 2, 2014

Fund Code	Fund Name	2013 Certified Budget	2014 Proposed Budget	% Change, 2013-2014	Difference - State Growth Quotient	Difference - County Growth Quotient	Action
0061	RAINY DAY	\$200,000	\$200,000	0.00%	-2.60%	-2.20%	Edit
0101	GENERAL	\$6,900,000	\$7,200,000	4.35%	1.75%	2.15%	Edit
0180	DEBT SERVICE	\$1,065,089	\$1,118,953	5.00%	2.40%	2.80%	Edit
1214	CAPITAL PROJECTS (School)	\$957,210	\$1,930,481	101.68%	99.08%	99.48%	Edit
6301	TRANSPORTATION	\$728,516	\$788,800	8.27%	5.67%	6.07%	Edit
6302	BUS REPLACEMENT	\$176,600	\$232,800	31.82%	29.22%	29.62%	Edit

Form Signature

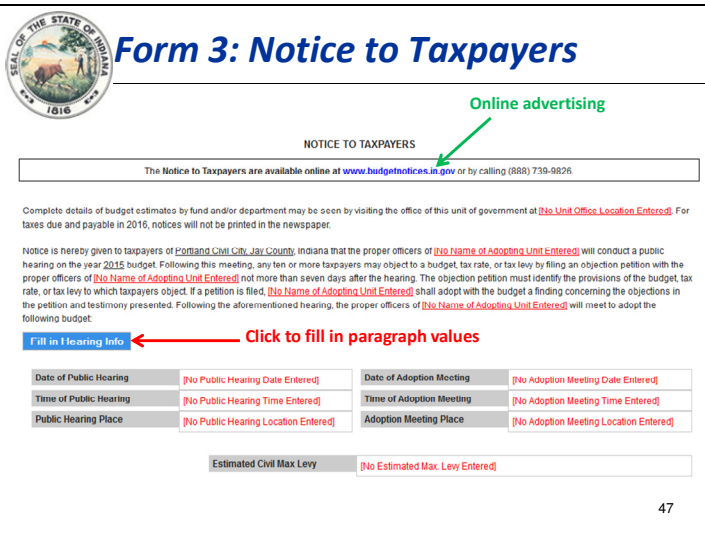
NAME: Gavin Rossdale  
TITLE: Clerk-Treasurer  
SIGNATURE: [Signature]  
DATE: [Date]

Click AND SUBMIT FORM

46

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 47



**Form 3: Notice to Taxpayers**

**NOTICE TO TAXPAYERS**

The Notice to Taxpayers are available online at [www.budgetnotices.in.gov](http://www.budgetnotices.in.gov) or by calling (888) 739-9826.

Complete details of budget estimates by fund and/or department may be seen by visiting the office of this unit of government at [\[No Unit Office Location Entered\]](#). For taxes due and payable in 2016, notices will not be printed in the newspaper.

Notice is hereby given to taxpayers of [\[No Name of Adopting Unit Entered\]](#) that the proper officers of [\[No Name of Adopting Unit Entered\]](#) will conduct a public hearing on the year 2015 budget. Following this meeting, any ten or more taxpayers may object to a budget, tax rate, or tax levy by filing an objection petition with the proper officers of [\[No Name of Adopting Unit Entered\]](#) not more than seven days after the hearing. The objection petition must identify the provisions of the budget, tax rate, or tax levy to which taxpayers object. If a petition is filed, [\[No Name of Adopting Unit Entered\]](#) shall adopt with the budget a finding concerning the objections in the petition and testimony presented. Following the aforementioned hearing, the proper officers of [\[No Name of Adopting Unit Entered\]](#) will meet to adopt the following budget:

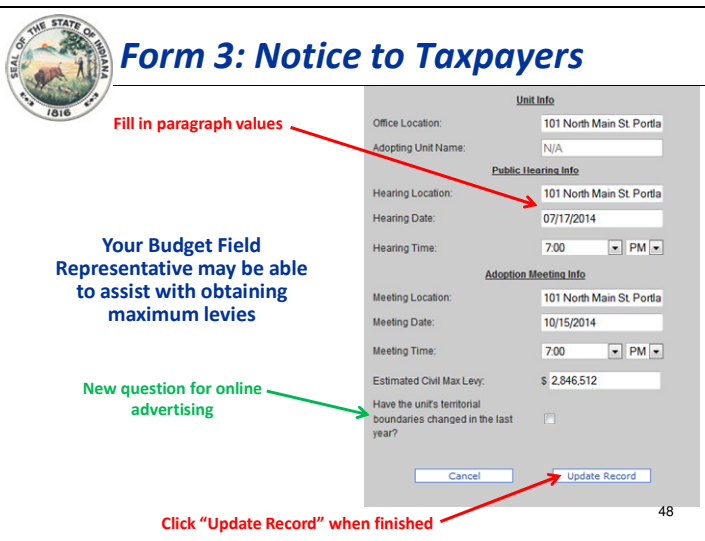
**Fill in Hearing Info** ← **Click to fill in paragraph values**

Date of Public Hearing	<a href="#">[No Public Hearing Date Entered]</a>	Date of Adoption Meeting	<a href="#">[No Adoption Meeting Date Entered]</a>
Time of Public Hearing	<a href="#">[No Public Hearing Time Entered]</a>	Time of Adoption Meeting	<a href="#">[No Adoption Meeting Time Entered]</a>
Public Hearing Place	<a href="#">[No Public Hearing Location Entered]</a>	Adoption Meeting Place	<a href="#">[No Adoption Meeting Location Entered]</a>

Estimated Civil Max Levy [\[No Estimated Max Levy Entered\]](#)

47

Slide 48



**Form 3: Notice to Taxpayers**

**Fill in paragraph values**

**Your Budget Field Representative may be able to assist with obtaining maximum levies**

**New question for online advertising**

**Click "Update Record" when finished**

**Unit Info**

Office Location: 101 North Main St Portia

Adopting Unit Name: N/A

**Public Hearing Info**

Hearing Location: 101 North Main St Portia

Hearing Date: 07/17/2014

Hearing Time: 7:00 PM

**Adoption Meeting Info**

Meeting Location: 101 North Main St Portia

Meeting Date: 10/15/2014

Meeting Time: 7:00 PM

Estimated Civil Max Levy: \$ 2,846,512


Have the unit's territorial boundaries changed in the last year? ☐

Cancel Update Record

48

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 49



## Form 3: Notice to Taxpayers

NOTICE TO TAXPAYERS

The Notice to Taxpayers are available online at [www.budgetnotices.in.gov](http://www.budgetnotices.in.gov) or by calling (888) 739-9826.

Complete details of budget estimates by fund and/or department may be seen by visiting the office of this unit of government at 101 North Main St. Portland, IN. For taxes due and payable in 2015, notices will not be printed in the newspaper.

Notice is hereby given to taxpayers of Portland City, Jay County, Indiana that the proper officers of Portland City will conduct a public hearing on the year 2015 budget. Following this meeting, any ten or more taxpayers may object to a budget, tax rate, or tax levy by filing an objection petition with the proper officers of Portland City not more than seven days after the hearing. The objection petition must identify the provisions of the budget, tax rate, or tax levy to which taxpayers object. If a petition is filed, Portland City shall adopt with the budget a finding concerning the objections in the petition and testimony presented. Following the aforementioned hearing, the proper officers of Portland City will meet to adopt the following budget:

**Fill in Hearing Info**


Date of Public Hearing	Thursday, July 17 2014	Date of Adoption Meeting	Wednesday, October 15 2014
Time of Public Hearing	7:00 PM	Time of Adoption Meeting	7:00 PM
Public Hearing Place	101 North Main St. Portland, IN	Adoption Meeting Place	101 North Main St. Portland, IN

Estimated Civil Max Levy\$ 2,046,512

Paragraph values are now completed

49

Slide 50



## Form 3: Notice to Taxpayers

1 Fund Name	2 Budget Estimate	3 Maximum Estimated Funds to be Raised (Including appeals and levies exempt from maximum levy limitations)	4 Successive Levy Appeals (Included in Column 3)	5 Current Tax Levy
	Click Here to Insert Form 4b published amounts	Click Here to Insert Form 4b published amounts		
0061-RAINY DAY	\$ 0	\$ 0	\$ 0	0
0101-GENERAL	\$ 0	\$ 0	\$ 0	1,492,847
0706-LOCAL ROAD & STREET	\$ 0	\$ 0	\$ 0	0
0708-MOTOR VEHICLE HIGHWAY	\$ 0	\$ 0	\$ 0	808,693
1301-PARK & RECREATION	\$ 0	\$ 0	\$ 0	224,520
1380-PARK BOND	\$ 0	\$ 0	\$ 0	149,469
2391-CUMULATIVE CAPITAL DEVELOPMENT	\$ 0	\$ 0	\$ 0	78,424
9501-Local Option Income Tax Public Safety	\$ 0	\$ 0	\$ 0	0
Totals:	Total: \$ 0	Total: \$ 0	Total: \$ 0	Total: \$ 2,754,953


Pull from Form 4B or enter data manually

Save

50

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 51



## Form 3: Notice to Taxpayers

0706-LOCAL ROAD & STREET	\$ 29,250	\$ 0	\$ 0	0
0708 MOTOR VEHICLE HIGHWAY	\$ 992,385	\$ 808,884	\$ 0	808,893
1301-PARK & RECREATION	\$ 295,300	\$ 224,701	\$ 0	224,520
1380-PARK BOND	\$ 179,266	\$ 149,469	\$ 0	149,469
2391-CUMULATIVE CAPITAL DEVELOPMENT	\$ 150,000	\$ 87,500	\$ 0	78,424
9501-Local Option Income Tax Public Safety	\$ 236,000	\$ 0	\$ 0	0
<b>Totals:</b>	<b>Total: \$ 5,473,535</b>	<b>Total: \$ 2,838,954</b>	<b>Total: \$ 0</b>	<b>Total: \$ 2,754,953</b>

Form values saved at 09:06 AM and 50 seconds. Save

**Click to preview online advertisement** → [Preview my Online Public Notice to Taxpayers](#)

No Notices submitted or archived.


Ready to Submit

This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

**Mark as "Ready to Submit"**

51

Slide 52



## Form 3: Notice to Taxpayers

**Must be submitted by:**

- September 13
- &
- 10 days before the public hearing

[Error Prevention Report](#)

Click to review common errors.

**Current Year Financial Worksheet: Additional Calculations for Form 4B**

**Debt Worksheet**

**Form 1: Budget Estimate**

**Form 2: Estimate of Miscellaneous Revenues**

**Form 3: Notice to Taxpayers**

[Click to edit form](#)

[Click to submit completed form to DLGF](#)

**Form 3: Notice to Taxpayers**


[Click to view form](#)      ☒ This form has been submitted.

**Submit to fulfill online advertising** →

52

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 53



## Form 4: Ordinance/Resolution for Appropriations and Tax Rates

**This Form is Invalid until all form values have been entered.**

Be it ordained / resolved by the No Adopting Unit Entered that for the expenses of Portland City Council for the year ending December 31, 2015 the sums herein specified are hereby appropriated and ordered set apart out of the several funds herein named and for the purposes herein specified, subject to the laws governing the same. Such sums herein appropriated shall be held to include all expenditures authorized to be made during the year, unless otherwise expressly stipulated and provided for by law. In addition, for the purposes of raising revenue to meet the necessary expenses of Portland City Council, the property tax levies and property tax rates as herein specified are included herein. Budget Form 4-B for all funds must be completed and submitted in the manner prescribed by the Department of Local Government Finance.

This ordinance/resolution shall be in full force and effect from and after its passage and approval by the No Adopting Body Entered.

Name of Adopting / Fiscal Body	Type of Adopting / Fiscal Body	Date of Adoption

Enter Information into Paragraph Above ← Click to fill in paragraph values

**Input Paragraph Information**

Date of Adoption  
10/15/2014

Name of Adopting / Fiscal Body  
Portland City Common Council


Select Type of Adopting / Fiscal Body  
Common Council and Mayor

Cancel
Update Record

Click "Update Record" when finished

53

Slide 54



## Form 4: Ordinance/Resolution for Appropriations and Tax Rates

Values pull from lines 1, 16, and 17 of the adopted column of Form 4B

Fund Code	Fund Name	Adopted Budget	Adopted Tax Levy	Adopted Tax Rate
0061	RAINY DAY	\$150,000	\$0	0.0000
0101	GENERAL	\$3,492,334	\$1,567,800	0.8959
0706	LOCAL ROAD & STREET	\$29,250	\$0	0.0000
0708	MOTOR VEHICLE HIGHWAY	\$992,385	\$808,884	0.4622
1301	PARK & RECREATION	\$295,300	\$224,701	0.1284
1380	PARK BOND	\$179,226	\$149,469	0.0854
2391	CUMULATIVE CAPITAL DEVELOPMENT	\$150,000	\$87,500	0.0500

Fund ID	Fund Code	Fund Name	Adopted Budget	Action
1024	9501	Local Option Income Tax Public Safety	\$0	<a href="#" style="color: #4f81bd;">Edit</a>

Copy Home-Ruled Budgets from Form 1

Home-rule fund budgets can be pulled from the adopted column of Form 1 or entered manually

54

## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 55

**Form 4: Ordinance/Resolution for Appropriations and Tax Rates**

Edit	Delete	Name	Aye	Nay	Abstain	Signature
X		James Dean	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
X		Judy Garland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
X		Holly Johnson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<a href="#">+ADD</a> Steve McQueen						

Enter a voting board/council member and click "+ADD" to save. Repeat until all are added.

**ATTEST**

Name	Title	Signature
Lety Dorman	Clerk-Treasurer	

**MAYOR ACTION (For City use only)**

Name	Approve	Veto	Signature	Date
Tristan Alexander Loudon	<input type="checkbox"/>	<input type="checkbox"/>		

Cities, Towns, and Counties must attest. Cities will also add their Mayor.

[Save](#)

[Ready to Submit](#)

This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Once Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

Review your Form 4 information and amounts and mark as 'Ready to Submit'

Slide 56

**Exporting/Printing the Form 4**

Home About Account Settings Help Logout Local

Select Unit: Jay County > Budget Form Menu > Form 4

Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

[Click Here for Print/View Options](#)

[Print/View Form 4 in PDF Format](#)

Select Print/View in PDF

Print for adoption meeting

Prescribed by the Department of Local Government Finance  
Approved by the State Board of Accounts

Budget Form No. 4 (Rev. 2013)

**ORDINANCE OR RESOLUTION FOR APPROPRIATIONS AND TAX RATE**

Ordinance Number:

Be it ordained by the Portland City Common Council that for the expenses of PORTLAND CIVIL CITY for the year ending December 31, 2015 the sums herein specified are hereby appropriated and ordered set apart out of the several funds herein named and for the purposes herein specified, subject to the laws governing the same. Such sums herein appropriated shall be held to include all expenditures authorized to be made during the year, unless otherwise expressly stipulated and provided for by



## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 57

**1782 Notice Recipients**

Use this form to register any recipients of this unit's 1782 notice e-mail.

Contact Name	Contact Email	Phone Number (Optional)	Action
Burt Reynolds	breyolds@email.com	(555) 123-4567	<a href="#">Edit</a> - <a href="#">Delete</a>
Letty Dorman	ldorman@email.com	(555) 765-4321	<a href="#">Add</a>

**Form Signature**

NAME: Letty Dorman  
TITLE: Clerk-Treasurer  
SIGNATURE/PIN: [Signature]  
DATE: 06/02/2014

Form signature values saved at 10:52 AM and 52 seconds. [SIGN AND DATE FORM](#)

☒ Ready to Submit

This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

**Mark as Ready to Submit**

**Select Add to save**

**Sign the form**

57

Slide 58

**Signing/Subsubmitting the Forms**

Department of Local Government Finance

Select Unit > Unit Main Menu > Upload Budget Documents  
Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

Select from Available Forms

[Error Prevention Report](#)  
Click to review common errors.

Current Year Financial Worksheet: Additional Calculations for Form 4B	✓
Debt Worksheet	✓
Form 1: Budget Estimate	✓
Form 2: Estimate of Miscellaneous Revenues	✓
Form 3: Notice to Taxpayers	✓
Form 4: Ordinance / Resolution of Appropriations and Tax Rates	✓
Form 4A: Budget Report	✓
Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate	✓
1782 Recipients: Registration of 1782 Notice E-mail Recipients	⚠


[Click to edit form](#) [Click to submit completed form to DLGF](#)

**Click to Submit**


58

# 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 59



## Upload Budget Documents



for government units

Indiana Data Site

Home About Account Settings Help Logout

Department of Local Government Finance

Select Unit • Unit Main Menu • Upload Budget Documents

Selected Year: 2013 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

Submit Files - 0417 Portland Civil City, Jay Co.

Select file type

Submit File

Select file type: Proof of Publication (Form 3) Enter description for "Other":  Please note: The Proof of Publication often consists of the Publisher's Classification and an attached newspaper clipping.

Either a Description: Daily Chronicle

Select File to Upload: Browse...

Upload File


Select file type

Enter Description

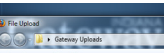
Select browse to locate your document

59

Slide 60



## Upload Budget Documents



for government units

Indiana Data Site

Department of Local Government Finance

Select Unit • Unit Main Menu • Upload Budget Documents

Selected Year: 2013 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

Submit Files - 0417 Portland Civil City, Jay Co.

Select your file

Select "Open" to finalize your selection

Select "Upload File"


60

## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 61



### Upload Budget Documents


INDIANA Gateway  
for government unitsAn Information for Indiana Data SiteDepartment of  
Local Government Finance

Home | About | Account Settings | Help | Logout

Select Unit | Unit Main Menu | **Upload Budget Documents**

Selected Year: 2015 | Selected Unit: Jay County - 0417 Portland Civil City, Jay Co.

#### Submit Files - 0417 Portland Civil City, Jay Co.

**Submit File**  
Select file type:  
Proof of Publication (Form 3)   
Enter a Description:

Enter description for "Other":

Please note: The Proof of Publication often consists of the Publisher's Claims/Disclaimer and an attached newspaper clipping.


Select File to Upload:  
 No file selected.  
**File Upload Successful**

Successfully Submitted Documents



Publication File Name	File Type	File Description	Action
<a href="#">Proof of Publication.pdf</a>	Proof of Publication	Daily Chronicle	<a href="#">Delete</a>
<a href="#">Signed Form 4.pdf</a>	Signed Bgt. Ordinance/Resolution	Signed Form 4	<a href="#">Delete</a>

61

Slide 62



### Gateway Resources

- User Guides
- Information Icons 
-  Videos
- Email
- Call

62

## 2014 Budget Workshop Held on June 17 and Repeated June 25

Slide 63



### Contact the Department

- Email: [gateway@dlgf.in.gov](mailto:gateway@dlgf.in.gov)
- Telephone: (317) 232-3777
- Toll Free: (888) 739-9826
- Website: [www.in.gov/dlgf](http://www.in.gov/dlgf)
  - "Contact Us": [www.in.gov/dlgf/2338.htm](http://www.in.gov/dlgf/2338.htm)

63